

Non-Profit Best Practices: The Right People & A Strategic Path

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I attended my first AFA Annual Meeting in 2007, and I remember looking to those sitting at the front of the business meeting and thinking, “Gosh, this feels a lot like a chapter meeting.” This occurred to me because the level of decisions being made by the membership, and the roles the leadership was playing in that decision-making process, didn’t align with where I thought a board should spend its time or what role the membership should play in the governing process. What I saw was an operational board, not a governing board. That’s not to say the board was never strategic, as they were at times. However, the mere structure of the association necessitated a significant need for operational work and oversight.

Almost twelve years later, the association is in a very different place. The board has moved away from the committee-based structure that guided the work of the association since its early days and has adopted a revised volunteer chart which supports the strategic work of the association. The board’s meeting agenda reflects issues that will not affect the membership in the year ahead, but rather over the next number of years. The board empowers a significant level of decision making to be done by the executive director and association staff, which is larger than ever, and needed to meet the ever-growing needs of members and the industry.

With all of these changes and the growth of the association (in size and scope), I have to contemplate, “Have we done enough to evolve our governance structure to reflect the needs of the modern board of directors — not just within AFA, but within the non-profit world?” More specifically, I wonder if our board structure reflects our needs. I am not just speaking to who should chair the board and how that chair should be selected. I also wonder, do we know what we need and expect in terms of competencies for a member who thinks they are ready to accept the responsibility of leadership? We should want the most talented members being placed on our board, regardless of who or what role a member plays in their professional job.

I’ve chaired more than eight boards, and I have been a member of almost 20 since the time I graduated college in 2003. I have worked for an organization with direct board access, and I am now employed by an organization where I report directly to a board of directors. It is fair to say I have been a part of boards in various stages of evolution — from programming to governance — and I have worked with boards that are highly functioning and those that struggle to find their place in governance.

I am an avid reader and a member of several organizations that sharpen my mind through their research and publications. As a non-profit leader, I find some of my most valuable learning comes from the American Society of Association Executives (ASAE), an organization with more than 44,000 members representing more than 7,400 organizations. In addition to being a source of knowledge, ASAE says they “provide resources, education, ideas, and advocacy to enhance the power and performance of the association and nonprofit community.” I would like to use their work to offer a few thoughts for AFA as we approach the next phase of our evolution.

In an article titled “[Effective Board Performance Starts with the Right People](#),” ASAE author Emily Rabbitt (2019) draws on ASAE Foundation research to provide a framework for recruiting the right board of directors. Among her thoughts were two strategies that AFA already does well — use a nominating committee to find the right fit and get buy-in from the board that evolution is necessary. We have long used a nominating committee to select our next leaders and, as the Foundation chair, I sit in the AFA Board meetings knowing first-hand that the group has a high level of buy-in for ensuring the right talent sits around the table to consider the most pressing issues of our shared work.

While both thoughts by the author are strengths for the AFA Board, we have some work to do on Rabbit’s (2019) third point — identifying the right competencies for board members. Each year, the board prepares characteristics and provides them to the Nominations & Elections Committee (NEC). However, we must do more. This is especially true in a membership-based organization where many of our members share the same skill sets and come from a similar background. For campus-based members, contrast this to the board of trustees or board of regents for your university. The university has a much broader pool to recruit from, and they can easily draw an outline for an ideal member based on who is at their fingertips in alumni, parents, and community members (prior board experience, financial management oversight, higher education experience, entrepreneurship, resources, etc.).

While AFA is not a board of trustees, our board is charged with many of the same responsibilities. These include management of staff, financial oversight and resource investment, strategic planning, and more. Therefore, we must find our own balance between nominating and selecting members who “get” our work and also understand how to run a modern association. I submit we must take a much longer-term approach with our nominating process and establish a rubric for what we need in a board member. This must go beyond where they work, and the rubric will truly consider what experience they bring and what skills they can leverage to help our association navigate the choppy waters now and in the years ahead.

Mark Athitakis (2019) published an article, ["The Path to a More Strategic Board,"](#) where he cited a 2017 Heidrick & Struggles/George Mason University survey that noted "nearly a third (31 percent) of incoming association and nonprofit board members were not oriented in their organization's strategic plan." Furthermore, he referenced a 2016 survey from Concord Leadership Group, which "reported 29 percent of nonprofits don't have a strategic plan at all." He provided several thoughts on how organizations can ready their boards for service (Athitakis, 2019).

In his first point, "A Level Playing Field," he suggested "the current dearth of strategic thinking may be in part the result of a positive change in the nonprofit sector (Athitakis, 2019). Associations are recognizing that the old-fashioned path to board leadership — members toiling for years in committee and other volunteer roles before landing a board seat — alienated many talented and younger members" (Athitakis, 2019). He goes on to quote governance consultant Jean S. Frankel who believes "all these are traditional ways (committees) for people to get oriented and for the association to create a pipeline where members had a sense of what their roles were," and might be partially to blame for alienation of younger members (Athitakis, 2019). He further suggests with new ways to leadership, board members "are not universally prepared in a consistent way, in a way that the people were when they came up through a more formal structure" (Athitakis, 2019).

This means while the work of the association is now being done by staff and some volunteers, there is an absence of those who rise through the ranks ready for board service. We must rethink the way we ready members for board service, particularly in a rapidly changing higher education and fraternity/sorority landscape. Our staff and board will have to continue to find ways to engage members in strategic thinking before they are nominated, elected, and ultimately take their seat on the board. In the same article, Gary A. LaBranche, FASAE, CAE, president and CEO of the National Investor Relations Institute (NIRI), says "I try to get them (new board members) involved in strategic thinking at orientation by asking them to engage in conversation on critical questions about the profession that are not easily answered with a yes or no" (Athitakis, 2019).

In his last two points, Mark (2019) suggests the shift in who we recruit, and how we recruit them, is not enough. He elaborates two final points — the need for constant conversation and the need to create new pipelines for board service — as just as crucial as new board member readiness (Athitakis, 2019). The balance of in-person conversations focusing on strategy and board needs are just as real as the surveys, assessments, etc. the board routinely takes on as a part of its work (Athitakis, 2019). Together, they keep the competencies of future board members at the

forefront of the work. When combined with on-going board recruitment and recruit training, the board can be in a much better spot to recruit and onboard its newest members.

As we approach the upcoming vote on the composition of the board and the method the association selects its chairperson, as well as the election of new board members, I encourage the membership to think about what we need in our board to get our association to the next level. While our work is important and we have a narrowly defined role in our industry, our board is not narrowly defined and, in large part, their work aligns with that of thousands of other boards. Should we not want the best structure and the most qualified members? Perhaps it is time we considered non-profit best practices in our decisions.

References

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